

North Dakota State University

# Departmental Position and Org Charting Guide

Human Resource/Payroll & Budget  
How-To Guide

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## Human Resources/Payroll Contact Guide

**SGC 102**  
**Fax Number (701) 231-9686**  
[www.ndsu.edu/hr](http://www.ndsu.edu/hr)

*Appointments are recommended in order to provide employees with the best possible service.*

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- Jill Spacek** – HR Administrator (701) 231-8525  
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**Brittnee Steckler**— Benefits Coordinator

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Benefits administration; coordinate Responsibility Review process and New Employee Orientation; shared leave, FMLA, military leave, ADA accommodations contact.

**Liz Thompson** – HRMS Technician

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HRMS PeopleSoft contact, assist with salary administration.

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The duties of the NDSU Budget Office and Ag Budget Office include the funding and budget portions of payroll forms. They are responsible for processing funding changes, budget adjustments and retroactive distributions in relation to payroll. They are also responsible for the activation and/or inactivation of combination codes in HRMS. Please contact someone in the appropriate Budget Office for assistance.

# ORGANIZATIONAL DEVELOPMENT

## Maintain Positions/Budgets

### Add/Update Position Information

[Organizational Development](#)>[Position Management](#)>[Maintain Positions/Budgets](#)>[Add/Update Position Info](#)

The screenshot shows the Oracle HRMS 'Add/Update Position Info' page. The search criteria are set to Department 3140. The search results table is as follows:

Position Number	Description	Position Status	Business Unit	Department	Job Code	Reports To Position Number
00019230	Associate Director of HR	Approved	NDSU1	3140	110515	00024449
00019587	HR Clerk	Approved	NDSU1	3140	521501	(blank)
00019918	Associate Director for Payroll	Approved	NDSU1	3140	311035	00024449
00020259	Director of HR	Approved	NDSU1	3140	011512	00021035
00020951	Benefits Coordinator	Approved	NDSU1	3140	311034	00019230
00021441	HR Administrator	Approved	NDSU1	3140	311041	00024449
00021481	HRMS Technician	Approved	NDSU1	3140	420513	00019230

Enter your Department Number. Hit search button. All the department positions appear. Shows:

- Position Number
- Description (Functional Title)
- Position Status
- Business Unit (always NDSU1)
- Department Number
- Job Code
- Reports to Position Number

Or you can just select a position number: 00021481 Hit Enter

Click on tab: **Description**

The screenshot shows a web browser window displaying the Oracle HRMS 'Add/Update Position Info' page. The page has three tabs: 'Description', 'Specific Information', and 'Budget and Incumbents'. The 'Description' tab is active, showing the following information:

Position Information	
Position Number:	00021481
Headcount Status:	Filled
Current Head Count:	1 out of 1
Effective Date:	03/01/2010
Status:	Active
Reason:	UPD Position Data Update
Action Date:	04/30/2010
Position Status:	Approved
Status Date:	12/15/2004
<input type="checkbox"/> Key Position	

Job Information	
Business Unit:	NDSU1 North Dakota State University
Job Code:	420513 Information Systems Tech/Para
Manager Level:	Ag- Technical
Reg/Temp:	Regular
Full/Part Time:	Full-Time
Regular Shift:	N/A
Union Code:	
Title:	HRMS Technician
Short Title:	HRMS Tech Detailed Position Description

Work Location	
Reg Region:	USA United States
Department:	3140 Human Resources/Payroll
Company:	NDS North Dakota State University
Location:	A-STOPNGO Stop N Go
Reports To:	00019230 Associate Director of HR
Dot-Line:	
Supervisor Lvl:	<input type="checkbox"/> Assistant

**Position Information:**

- Indicates if the position is filled or if it is vacant
- Indicates whether it is a position that allows multiple incumbents - 1 out of 9999 (pool) or a single incumbent - 1 out of 1
- Indicates status of the position (active or inactive)
- Title of the position
- Who the position reports to – only for benefitted employees

**Job Information**

- Job Code (Job Family is the first 4 digits of the job code)
- Regular/Temporary status
- Full-time or Part-time position
- FLSA status: exempt/nonexempt EX = exempt or NE = nonexempt at the end of salary plan
- Standard hours
- Reports To

**Work Location**

- What department the position is in
- Location of the position

Click on tab: **Specific Information**

The screenshot shows a web browser window displaying the Oracle HRMS 'Add/Update Position Info' page. The page is titled 'ORACLE You are on Database: NDHP'. The breadcrumb navigation is: Home > Add to Favorites > Sign out > Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info. The 'Specific Information' tab is selected, showing details for Position Number 00021481, which is 'Filled' with a 'Current Head Count' of 1 out of 1. The 'Effective Date' is 03/01/2010 and the 'Status' is 'Active'. A 'Job Profile ID' is listed. The 'Incumbents' section has checkboxes for 'Update Incumbents' (checked), 'Include Salary Plan/Grade' (unchecked), 'Budgeted Position' (checked), 'Confidential Position' (unchecked), 'Job Sharing Permitted' (unchecked), and 'Available for Telework' (unchecked). The 'Education and Government' section includes 'Position Pool ID', 'Pre-Encumbrance Indicator' (None), 'Calc Group (Flex Service)', 'Encumber Salary Option' (User Specified Amount), 'Academic Rank', 'Encumber Salary Amount' (999999.000), 'Classified Indicator' (All), 'FTE' (1.000000), and 'Adds to FTE Actual Count' (checked). The bottom of the page features a toolbar with buttons for Save, Return to Search, Previous in List, Next in List, Previous tab, Next tab, Add, Update/Display, Include History, and Correct Hi. The browser's status bar shows 'Done' and the system clock is 3:34 PM.

- This tells you the number of people in a position
- FTE



Click on tab: **Budget and Incumbents**

The screenshot shows the Oracle HRMS 'Add/Update Position Info' page. The 'Budget and Incumbents' tab is selected. The page displays the following information:

**Position Number:** 00021481  
**Headcount Status:** Filled  
**Current Head Count:** 1 out of 1

Current Budget				
Earnings	Deductions	Tax	Cdn Tax	Total
33500.000	33500.000	33500.000	0.000	100500.00

**Current Incumbents**

EmpID	Emp Rcd#	Full/Part	Std Hrs/Wk	Name	Job Data
0296158	0	Full-Time	40.00	Elizabeth Thompson	Job Data

Navigation buttons: Save, Return to Search, Previous in List, Next in List, Previous tab, Next tab, Add, Update/Display, Include History, Correct History.

- Indicates 'who' is in the position (if it is not vacant).

**Ignore the Current Budget box, it does not have correct data. The correct budget information follows on Page 16.**

# Review Positions/Budget Information

## Position History

[Organizational Development](#)>[Position Management](#)>[Review Position/Budget Info](#)>[Position History](#)

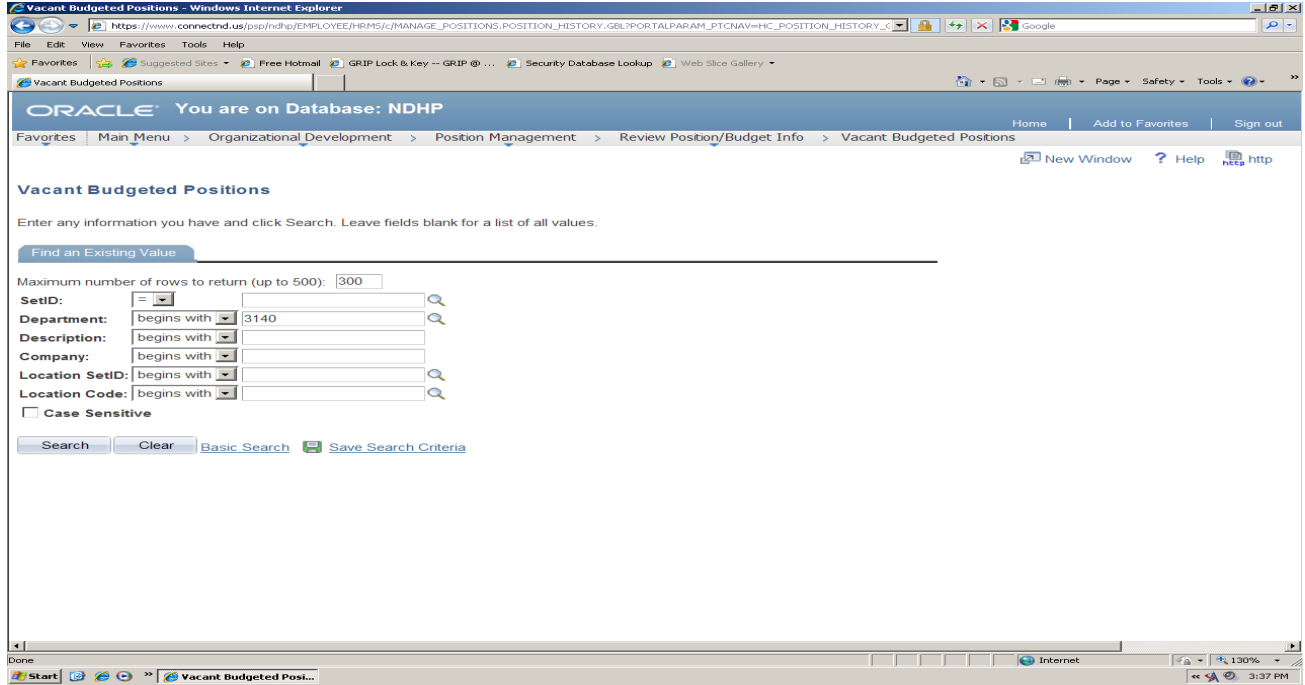
The screenshot shows a web browser window displaying the Oracle HRMS Position History page. The page title is "ORACLE You are on Database: NDHP". The breadcrumb navigation is: Home | Add to Favorites | Sign out | Favorites | Main Menu > Organizational Development > Position Management > Review Position/Budget Info > Position History. The page content includes a "Position History" tab and a "Current Position Data" section. The "Current Position Data" section shows two position entries for a Benefits Coordinator. The first entry is for position number 0316841, held by Britnee Steckler, with an entry date of 07/16/2006 and a compensation rate of 32,000.000000. The second entry is for position number 0600872, held by Lyn Pletta, with an entry date of 06/13/1995 and a compensation rate of 44,956.000000. Both entries have a position end date of 05/13/2006 and an exit reason of Termination. The page also includes a "Return to Search" button and a "Main Content" label.

Position Number	Employee Name	Compensation Rate	Position Entry Date	Position End Date	Exit Reason	Sal Plan	Grade	Step
0316841	Britnee Steckler	32,000.000000	07/16/2006			SLEX	300	
0600872	Lyn Pletta	44,956.000000	06/13/1995	05/13/2006	Termination	SLEX	300	

This screen will show the history of the position.

# Vacant Budgeted Positions

[Organizational Development](#)>[Position Management](#)>[Review Position/Budget Info](#)>[Vacant Budgeted Positions](#)



Enter your Department Number. Hit Search button.

Vacant Budgeted Positions - Windows Internet Explorer

https://www.connectrd.us/prp/ndhp/EMPLOYEE/HRMS/c/MANAGE\_POSITIONS.POSITION\_HISTORY.GBL?PORTALPARAM\_PTCNAV=HC\_POSITION\_HISTORY\_C\_...

Oracle You are on Database: NDHP

Home | Add to Favorites | Sign out

Favorites | Main Menu > Organizational Development > Position Management > Review Position/Budget Info > Vacant Budgeted Positions

Vacant Budgeted Positions

SetID: NDSU1 Department: 3140 Human Resources/Payroll Total Vacant Positions: 39997

Position Information | Job Information | Work Location

Position	Description	Position Status	Reports To	Short Description	Vacant Positions	Max Head Count	Full/Part Time	Regular/Temporary
00019587	HR Clerk	Approved			1	1	Full-Time	Regular
00022465	Student General	Approved			9999	9999	Part-Time	Temporary
00022597	Temporary General	Approved			9998	9999	Part-Time	Temporary
00022639	Temporary General	Approved			9999	9999	Part-Time	Temporary
00024449	Assoc VP, Finance & Admin	Approved	00021035	VPFin&Adm	1	1	Full-Time	Regular
00027091	COBRA Stimulus Employee	Approved			9999	9999	Part-Time	Temporary

Return to Search

Main Content

This will bring up a list of positions that have vacancies in them: Regular and Temporary.

# SET UP HRMS

## Combination Code Table

Combination codes are the funding sources that are used in HRMS for salary, deductions and taxes. They consist of the Business Unit, Fund, Department, Project/Grant (if applicable), Program Code (if applicable), and Account.

The Business Unit for NDSU is the letter S and it is the first character in the Combination Code.

The Account is also represented by a letter within the Combination Code as shown in the table below:

GL Account	Description	Letter	Use
511002	Salary – Regular Benefited	R	Use for all Benefited employees that are not considered faculty
511005	Staff Overload	S	Use for overload for group indicated above
512005	Salary – Other	O	Use for all time slip employees not employed by Ag or Forest Service
513005	Temp Salaries – Non Benefited	T	Use for time slip employees employed by Ag or Forest Service
514005	Overtime	V	Use for overtime (all employees)
515005	Salary – Faculty	F	Use for all faculty (including Part-Time Academic Staff)
515015	Salary – Non-Teaching Faculty - Extension Service	E	Use for 2000 band employees in the Extension Service that do not teach
515010	Faculty Overload	P	Use for overload for 2000 band employees
517005	Salaries – Graduate Assistants	G	Use for graduate students

An example of a Combination Code:

Business Unit	Fund	Department	Project/Grant	Program Code	Account
NDSU1	43500	7690	FAR0004080	04401	515005

As mentioned the Business Unit is represented by the letter S and the Account will be represented by the letter F. The Program Code will drop the leading number and will be identified by the last 4 digits. The result is the following (with spaces for clarity):

S 43500 7690 FAR0004080 4401 F

On any of the HRMS screens this would appear as the following:

S435007690FAR00040804401F

To see if a funding source is set up in the HRMS system you can look at the Combination Code Table. The Combination Code table is found at:

[Set Up HRMS>Product Related>Commitment Accounting>Budget Information>Combination Code Table](#)

The screen should look like this:

The screenshot shows a web browser window titled "Combination Code Table - Windows Internet Explorer". The address bar shows the URL: [https://www.connectnd.us/psp/ndhp\\_1/EMPLOYEE/HRMS/c/DEFINE\\_COMMIT\\_ACCOUNTING\\_US.DEPT\\_BUDGET.USA](https://www.connectnd.us/psp/ndhp_1/EMPLOYEE/HRMS/c/DEFINE_COMMIT_ACCOUNTING_US.DEPT_BUDGET.USA). The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The Favorites bar shows "Combination Code Table".

The Oracle logo is displayed at the top, followed by the text "You are on Database: NDHP". Below this is a breadcrumb trail: [Main Menu](#) > [Set Up HRMS](#) > [Product Related](#) > [Commitment Accounting](#) > [Budget Information](#) > [Combination Code Table](#).

### Combination Code Table

Enter any information you have and click Search. Leave fields blank for a list of all values.

Buttons: [Find an Existing Value](#) | [Add a New Value](#)

Maximum number of rows to return (up to 500):

Search criteria fields:

- SetID:
- GL Combination Code:
- Description:
- Search Additional Chartfields:
- Account:
- Department:
- Project/Grant:
- Product:
- Fund Code:
- Program Code:
- Class Field:
- Operating Unit:

Options:  Include History |  Correct History |  Case Sensitive

Buttons: [Search](#) | [Clear](#) | [Basic Search](#) | [Save Search Criteria](#)

Footer: [Find an Existing Value](#) | [Add a New Value](#)

To search for a combination code, enter your information in the appropriate boxes and click on search. NDSU1 should always be entered in the SetID field when searching for a combination code. If you use the Account field in your search use the 6 digit number instead of the letter at the end of the combination code. If there is a program code in the combination code, use all 5 digits in the search.

After searching you should see either the combination code string that you are looking for or “No matching values were found.” If you receive the message that nothing matched your search the combination code string may not be set up in HRMS or you may have some incorrect information in your search. Contact the appropriate Budget Office to set up the combination code or for help in determining why your search returned no results.

**Combination Code Table**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Maximum number of rows to return (up to 500): 300

SetID: begins with

GL Combination Code: begins with

Description: begins with

Search Additional Chartfields

Account: begins with

Department: begins with

Project/Grant: begins with

Product: begins with

Fund Code: begins with

Program Code: begins with

Class Field: begins with

Operating Unit: begins with

Include History  Correct History  Case Sensitive

[Basic Search](#)

**Search Results**

[View All](#) First 1-4 of 4 Last

SetID	Process Group	GL Combination Code	Status as of Effective Date	Description	Account	Department	Project/Grant	Product	Fund Code	Program Code	Class Field	Affiliate	Operating Unit	Alternate Account	Budget Reference	Chartfield 1	Chartfield 2	Chartfield 3
NDSU1	(blank)	S307423140O	Active	HUMAN RESOURCES	512005	3140	(blank)	(blank)	30742	(blank)	NDSU1	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)
NDSU1	(blank)	S307423140R	Active	HUMAN RESOURCES	511002	3140	(blank)	(blank)	30742	(blank)	NDSU1	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)
NDSU1	(blank)	S307423140T	Active	Human Resources	513005	3140	(blank)	(blank)	30742	(blank)	NDSU1	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)
NDSU1	(blank)	S307423140V	Active	HUMAN RESOURCES	514005	3140	(blank)	(blank)	30742	(blank)	NDSU1	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)

Find an Existing Value | Add a New Value

Once you have the combination code string you are searching for you can click on it to see details including effective date(s) and active/inactive status.

Combination Code Table - Windows Internet Explorer

https://www.connectnd.us/psp/ndhp/EMPLOYEE/HRMS/c/DEFINE\_COMMIT\_ACCOUNTING\_US\_VALID\_COMBO\_TABLE.NA?PORTALPARAM\_PTCNAV=HC\_VALID

File Edit View Favorites Tools Help

★ Favorites Combination Code Table

**ORACLE** You are on Database: NDHP

Favorites Main Menu > Set Up HRMS > Product Related > Commitment Accounting > Budget Information > Combination Code Table

### Combination Code Table

SetID: NDSU1  
 GL Combination Code: S307423140R

Combination Code Detail Find | View All First **1 of 1** Last

Effective Date: 01/01/1901 Status: Active

Description: HUMAN RESOURCES

Short Desc: HUMAN RESO  Valid Value

ChartField Detail	
Account :	511002
Department :	3140
Project/Grant :	
Product :	
Fund Code :	30742
Program Code :	
Class Field :	NDSU1
Affiliate :	
Operating Unit :	
Alternate Account :	
Budget Reference :	
Chartfield 1 :	
Chartfield 2 :	
Chartfield 3 :	

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History



## Department Budget Table

The Department Budget Table shows all information related to funding and budgeted amounts for a position. The Department Budget Table is found at:

[Setup HRMS](#)>[Product Related](#)>[Commitment Accounting](#)>[Budget Information](#)>[Department Budget Table USA](#)

The screen will look like the following screen:

The screenshot shows a web browser window titled "Department Budget Table USA - Windows Internet Explorer". The address bar contains the URL: [https://www.connectnd.us/psp/ndhp/EMPLOYEE/HRMS/c/DEFINE\\_COMMIT\\_ACCOUNTING\\_US.VALID\\_COMBO\\_TABLE.NA?PORTALPARAM\\_PTCNAV=HC\\_VALID](https://www.connectnd.us/psp/ndhp/EMPLOYEE/HRMS/c/DEFINE_COMMIT_ACCOUNTING_US.VALID_COMBO_TABLE.NA?PORTALPARAM_PTCNAV=HC_VALID). The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. A Favorites bar shows "Department Budget Table USA".

The page header displays "ORACLE You are on Database: NDHP". A breadcrumb trail reads: [Favorites](#) > [Main Menu](#) > [Set Up HRMS](#) > [Product Related](#) > [Commitment Accounting](#) > [Budget Information](#) > [Department Budget Table USA](#).

The main content area is titled "Department Budget Table USA". Below the title, it says: "Enter any information you have and click Search. Leave fields blank for a list of all values." A blue button labeled "Find an Existing Value" is positioned above a search input field.

Below the search field, there are several search criteria fields, each with a dropdown menu and a search icon:

- Maximum number of rows to return (up to 500): 300
- SetID: = [dropdown] NDSU1
- Department: begins with [dropdown]
- Fiscal Year: = [dropdown]
- Budget Level: = [dropdown]
- Position Pool ID: begins with [dropdown]
- Job Code SetID: begins with [dropdown]
- Job Code: begins with [dropdown]
- Position Number: begins with [dropdown]
- Empl ID: begins with [dropdown]
- Empl Rcd Nbr: = [dropdown]

There is an unchecked checkbox labeled "Include History". At the bottom, there are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria".

To search enter your department number and the current fiscal  
You should receive information that looks like the following screen:

If you searched by your department you should be able to click on any of the positions to see the details for that position. If you searched by position number to begin with it should take you directly to the screen with the details for that position.

The details for the position are on the second tab titled “Dept Budget Earnings”. The circle at the top of the screen shot shows the department number this position is set up in. The red box on the screen shot shows the position number and title. The next red circle shows the most recent effective date for any changes to funding or budgeting for this position.

The information under the blue bar labeled “Earnings Distribution” is what you will want to look at for funding and budgeting purposes. The Combination Code field shows the Combination Code that is set up to be used on this position. There will either be a budgeted amount or a distribution percentage listed for each position. If there is more than one funding source you will need to select View All on the Earnings Distribution bar in order to see all of the funding sources.

Some employees may have more than one Department Budget Table set up for them. One Department Budget Table will be set up for the position, as indicated in the previous pages. The other Department Budget Table will be set up at an “Appointment” level.

On the search page you can enter your department number, the current fiscal year and change the drop down for Budget Level to "Appointment". After clicking search you should see a list of all the Department Budget Tables for your department that are set up for specific employees. In the list that is returned you should see Empl ID and Empl Rcd Nbr instead of position numbers.

Department Budget Table USA - Windows Internet Explorer

https://www.connectnd.us/psp/ndhp/EMPLOYEE/HRMS/c/DEFINE\_COMMIT\_ACCOUNTING\_US.DEPT\_BUDGET.USA?PORTALPARAM\_PTCNAV=HC\_DEPT\_BUDGE

File Edit View Favorites Tools Help

Department Budget Table USA

ORACLE You are on Database: NDHP

Main Menu > Set Up HRMS > Product Related > Commitment Accounting > Budget Information > Department Budget Table USA

### Department Budget Table USA

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Maximum number of rows to return (up to 500): 300

SetID: = NDSU1

Department: begins with 3000

Fiscal Year: = 2011

Budget Level: = Appointment

Position Pool ID: begins with

Job Code SetID: begins with

Job Code: begins with

Position Number: begins with

Empl ID: begins with

Empl Rcd Nbr: = 0

Include History

Search Clear Basic Search Save Search Criteria

### Search Results

View All First 1 of 1 Last

SetID	Department	Fiscal Year	Budget Level	Position Pool ID	Job Code SetID	Job Code	Position Number	Empl ID	Empl Rcd Nbr
NDSU1	3000	2011	Appointment	(blank)	(blank)	(blank)	(blank)		

On the Earnings tab the same information will appear with the exception of the position number. Instead of the position number and title the Empl ID, Empl Rcd# and Employee name will appear instead.

Department Budget Table USA - Windows Internet Explorer

https://www.connectnd.us/psp/ndhp/EMPLOYEE/HRMS/c/DEFINE\_COMMIT\_ACCOUNTING\_US.DEPT\_BUDGET\_USA?PORTALPARAM\_PTCNAV=HC\_DEPT\_BUDGE

File Edit View Favorites Tools Help

Department Budget Table USA

**ORACLE** You are on Database: NDHP

Favorites Main Menu > Set Up HRMS > Product Related > Commitment Accounting > Budget Information > Department Budget Table USA

Dept Budget Date Dept Budget Earnings Dept Budget Deductions Dept Budget Taxes Dept Budget Actuals

SetID: NDSU1 Department: 3000 VP Finance and Administration Fiscal Year: 2011

Budget Begin Date: 07/01/2010 Offset Group: HIED1 Budget Cap

Budget End Date: 06/30/2011  Per Budget Level  Per Earn/Tax/Ded

Default Funding Source Actual

Option:

Level Find | View All First 1 of 1 Last

Department	Position Pool	Jobcode	Position	Appointment
Empl ID:	EmplID	Empl Name		
Empl Rcd#:	0			
Effective Date:	07/01/2010	Eff Seq: 0	Status: Active	Date Entered: 07/22/2010
Budget Level	Earnings Cap: 0.000.00	Currency: USD		
Cap:				

Earnings Distribution Find | View All First 1 of 1 Last

Earnings Code: SEQ#: 1 % Effort:

Combination Code: S307303000R VP Finance & Administration [ChartField Details](#)

Budget Amount: 0.000 Distrib %: 100.000

Funding End Date: Distributed:

Exclusion Fringe Group:

Redirect Combination Code: [ChartField Details](#)

Save Return to Search Notify Update/Display Include History

[Dept Budget Date](#) | [Dept Budget Earnings](#) | [Dept Budget Deductions](#) | [Dept Budget Taxes](#) | [Dept Budget Actuals](#)

# Funding Summary USA

[Set Up HRMS](#)>[Product Related](#)>[Commitment Accounting](#)>[Reports](#)>[Funding Summary USA](#)

Set up Run Control ID

The screenshot displays the Oracle HRMS interface for the 'Funding Summary USA' report. The browser title is 'Funding Summary USA - Windows Internet Explorer'. The URL is [https://www.connectnd.us/psp/ndhp/EMPLOYEE/HRMS/c/DEFINE\\_COMMIT\\_ACCOUNTING\\_US.RUN\\_BUD011.USA?PORTALPARAM\\_PTCNAV=HC...](https://www.connectnd.us/psp/ndhp/EMPLOYEE/HRMS/c/DEFINE_COMMIT_ACCOUNTING_US.RUN_BUD011.USA?PORTALPARAM_PTCNAV=HC...). The breadcrumb trail is: [Main Menu](#) > [Set Up HRMS](#) > [Product Related](#) > [Commitment Accounting](#) > [Reports](#) > [Funding Summary USA](#). The page title is 'Funding Summary Report'. Below the title, there is a 'Run Control ID' field containing 'FundingSummary', and buttons for 'Report Manager', 'Process Monitor', and 'Run'. The main section is 'Funding Summary Rpt Parameters', which includes the following fields and options:

- \*SetID:  (with a search icon)
- \*Department:  (with a search icon) Human Resources/Payroll
- \*Fiscal Year:
- \*As Of Date:  (with a calendar icon)
- Funding Summary By**:  Appointment Level  Position Level
- Report Option**:  Earnings  Deductions  Tax
- Position Number:

At the bottom of the form, there are several navigation buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, and Update/Display.

Run for either appt or position level

If an employee has a Department Budget Table set up at the Appointment Level that will override the Department Budget Table set up at the Position Level.

## Funding Summary Report

The Funding Summary Report shows information related to funding and budgeted amounts for all positions in a department. The report can be used to proof funding sources and budgets that are currently set up to be used for employees. This report will show the same information as the Department Budget Table without having to go into each individual DBT. The Funding Summary Report is found at:

[Setup HRMS >Product Related>Commitment Accounting>Reports>Funding Summary USA](#)

### Setup Run Control ID

When running the report you will need to use the following criteria:

SetID: NDSU1

Department: home department number of position

Fiscal Year: current fiscal year

As Of Date: can be current or a specific date

Funding Summary By: Position Level

Report Option: Earnings

The screenshot shows the Oracle HRMS interface for the 'Funding Summary Report'. The browser title is 'Funding Summary USA - Windows Internet Explorer'. The URL is [https://www.connectnd.us/psp/ndhp/EMPLOYEE/HRMS/c/DEFINE\\_COMMIT\\_ACCOUNTING\\_US.RUN\\_BUD011.USA?PORTALPARAM\\_PTCNAV=HC\\_R](https://www.connectnd.us/psp/ndhp/EMPLOYEE/HRMS/c/DEFINE_COMMIT_ACCOUNTING_US.RUN_BUD011.USA?PORTALPARAM_PTCNAV=HC_R). The breadcrumb trail is: [Favorites](#) > [Main Menu](#) > [Set Up HRMS](#) > [Product Related](#) > [Commitment Accounting](#) > [Reports](#) > [Funding Summary USA](#). The page title is 'Funding Summary Report'. Below the title, there are links for 'Report Manager', 'Process Monitor', and a 'Run' button. The 'Run Control ID' is 'FundingSummary'. The 'Funding Summary Rpt Parameters' section includes: '\*SetID: NDSU1', '\*Department: 3140 Human Resources/Payroll', '\*Fiscal Year: 2011', and '\*As Of Date: 10/01/2010'. There are two dropdown menus: 'Funding Summary By' with options 'Appointment Level' and 'Position Level' (selected), and 'Report Option' with options 'Earnings' (selected), 'Deductions', and 'Tax'. A 'Position Number' field is empty. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'.

Once the report has run the PDF will look like the example below:

PeopleSoft  
Position Funding Summary Report

Report ID: BUD011  
As Of Date: 07/01/2010  
Report Option: Earnings Distribution  
SetID: NDSUI Department: 3140 - Human Resources/Payroll Fiscal Year: 2011

Page No. 1  
Run Date 08/20/2010  
Run Time 09:36:36

POSITION #	STATUS		FUNDING LEVEL	COMBINATION CODE	EARN CODE	SQ	BUDGET AMOUNT	DIST. %	FUNDING End Date	TOTAL PTE
00019230	ACTIVE	Associate Director of HR	PN	S307423140R		1	78332.00			1.000000
00019587	ACTIVE	HR Clerk			No Funding Source Available					0.000000
00019918	ACTIVE	Associate Director for Payroll	PN	S307423140R		1	65130.00			1.000000
00020259	INACTIVE	Director of HR			No Funding Source Available					0.000000
00020951	ACTIVE	Benefits Coordinator	PN	S307423140R		1	40716.00			1.000000
00021441	ACTIVE	HR Administrator	PN	S307423140R		1	46170.00			1.000000
00021481	ACTIVE	HRMS Technician	PN	S307423140R		1	33500.00			1.000000
00022125	ACTIVE	Office Assistant	PN	S307423140R		1	29025.00			1.000000
00022465	ACTIVE	Student General	PN	S3074231400		1	6400.00			0.000000
					H14			25.000		
					H14			75.000		
00022597	ACTIVE	Temporary General	PN	S3074231400		1		100.000		0.000000
00022639	ACTIVE	Temporary General	PN	S3074231400		1	5327.00			0.000000
00022696	INACTIVE	Termed Student Employees			No Funding Source Available					0.000000
00022897	INACTIVE	Termed Student Employees			No Funding Source Available					0.000000
00022898	INACTIVE	Termed Student Employees			No Funding Source Available					0.000000
00022899	INACTIVE	Termed Temporary Employees			No Funding Source Available					0.000000
00022900	INACTIVE	Termed 9000 Emp			No Funding Source Available					0.000000
00022904	INACTIVE	Termed Temporary Employees			No Funding Source Available					0.000000
00022922	ACTIVE	Internal Payroll Specialist	PN	S307423140R		1	33901.00			1.000000
00022932	ACTIVE	Payroll/Benefits Specialist	PN	S307423140R		1	35243.00			1.000000
00022933	ACTIVE	Payroll Specialist	PN	S307423140R		1	36260.00			1.000000
00022946	ACTIVE	Employment Records Technician	PN	S307423140R		1	32054.00			1.000000
00023218	ACTIVE	Non Employees			No Funding Source Available					0.000000
00023966	ACTIVE	HR Employment Assistant	PN	S190653140R		1	631.00			1.000000
						1	32069.00			
00023967	ACTIVE	Employment Records Technician	PN	S307423140R		1	29500.00			1.000000
00024449	ACTIVE	Assoc VP, Finance & Admin	PN	S307423140R		1	140350.00			1.000000
00027091	ACTIVE	COBRA Stimulus Employee	PN	S1952131400		1		100.000		0.000000
00027364	ACTIVE	Records Specialist	PN	S190653140R		1	10150.00			0.000000
						1	20300.00			

Total Number of Positions Processed: - 27

End of Report

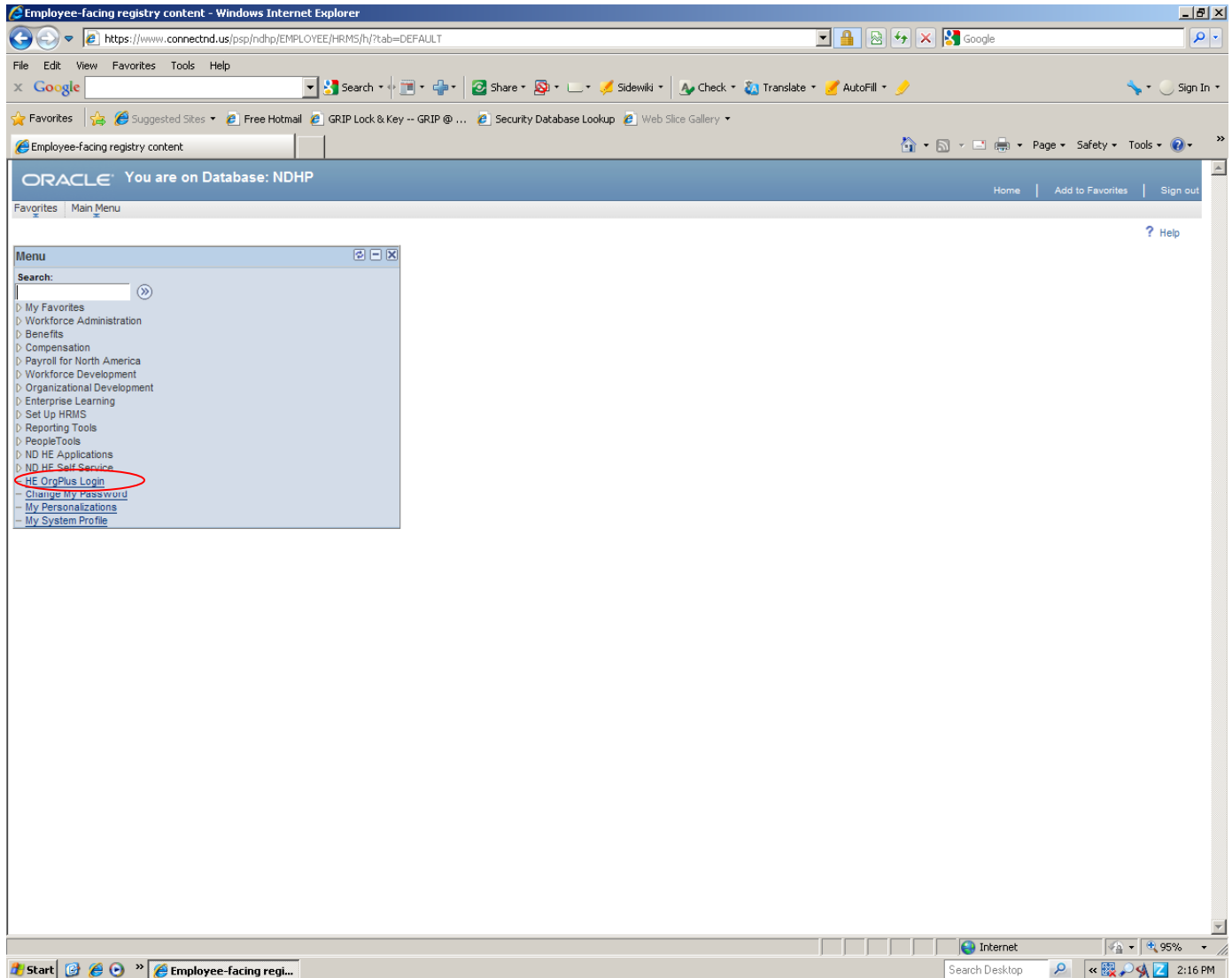
AP - Appointment Level    JC - JobCode Level    PN - Position Level    PP - Position Pool Level    DP - Department Level    JR - Job Earns Distribution    JD - Job Data

As mentioned in the section about Department Budget Tables there are some DBTs set up by appointment level. The report may need to be run again using the Funding Summary By: Appointment Level rather than Position Level in order get a complete picture for the department.

# ORG CHARTING WITH ORG PLUS

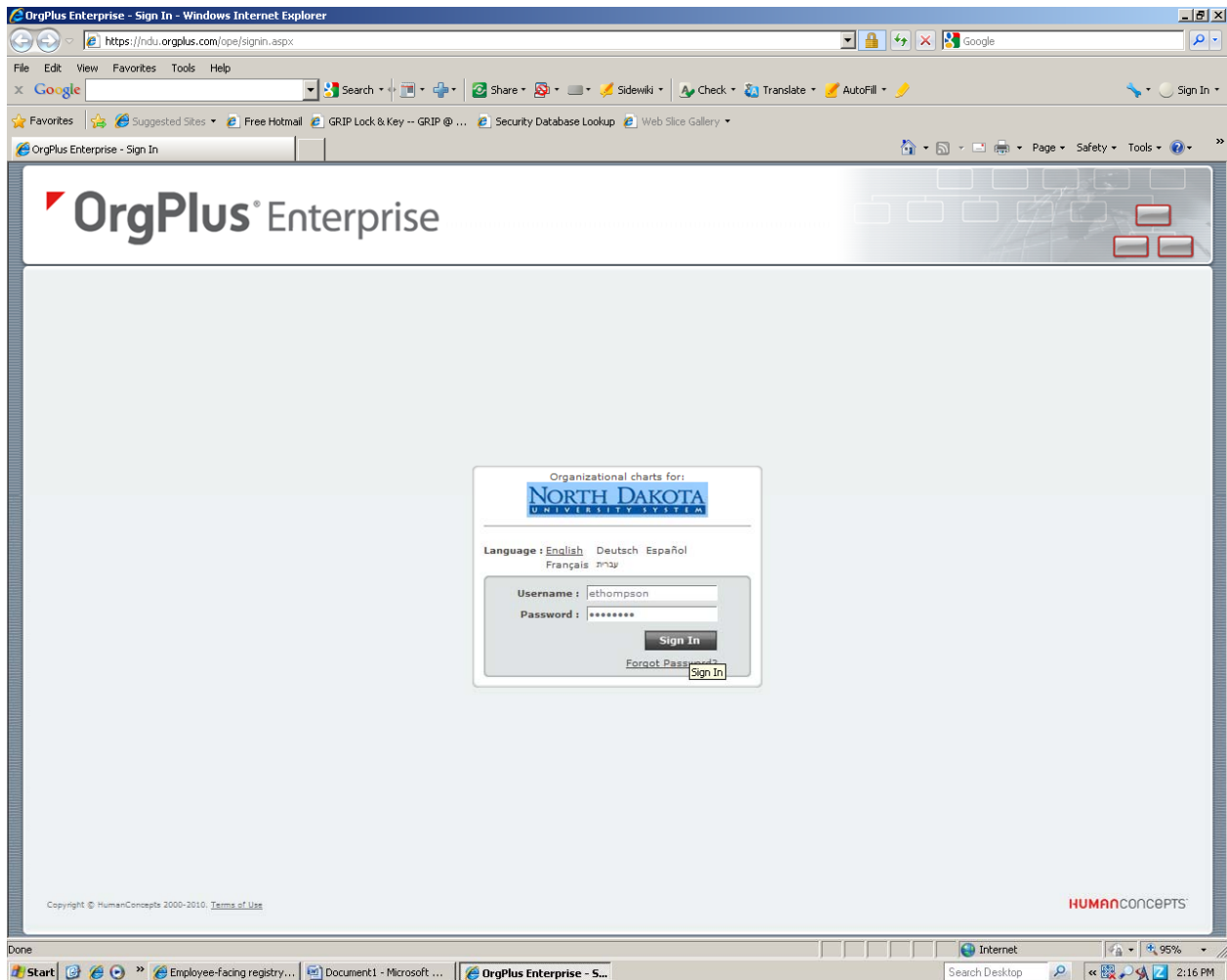
All employees that have the Department Admin security role will automatically be assigned access to Org Plus. Once you have been given security to the Org Plus module you will receive an e-mail with your username and password. If you have any errors or questions when you are viewing your Organizational Chart, please contact the HR/Payroll office.

You will then be able to see the HE OrgPlus Login option on the menu, see below:

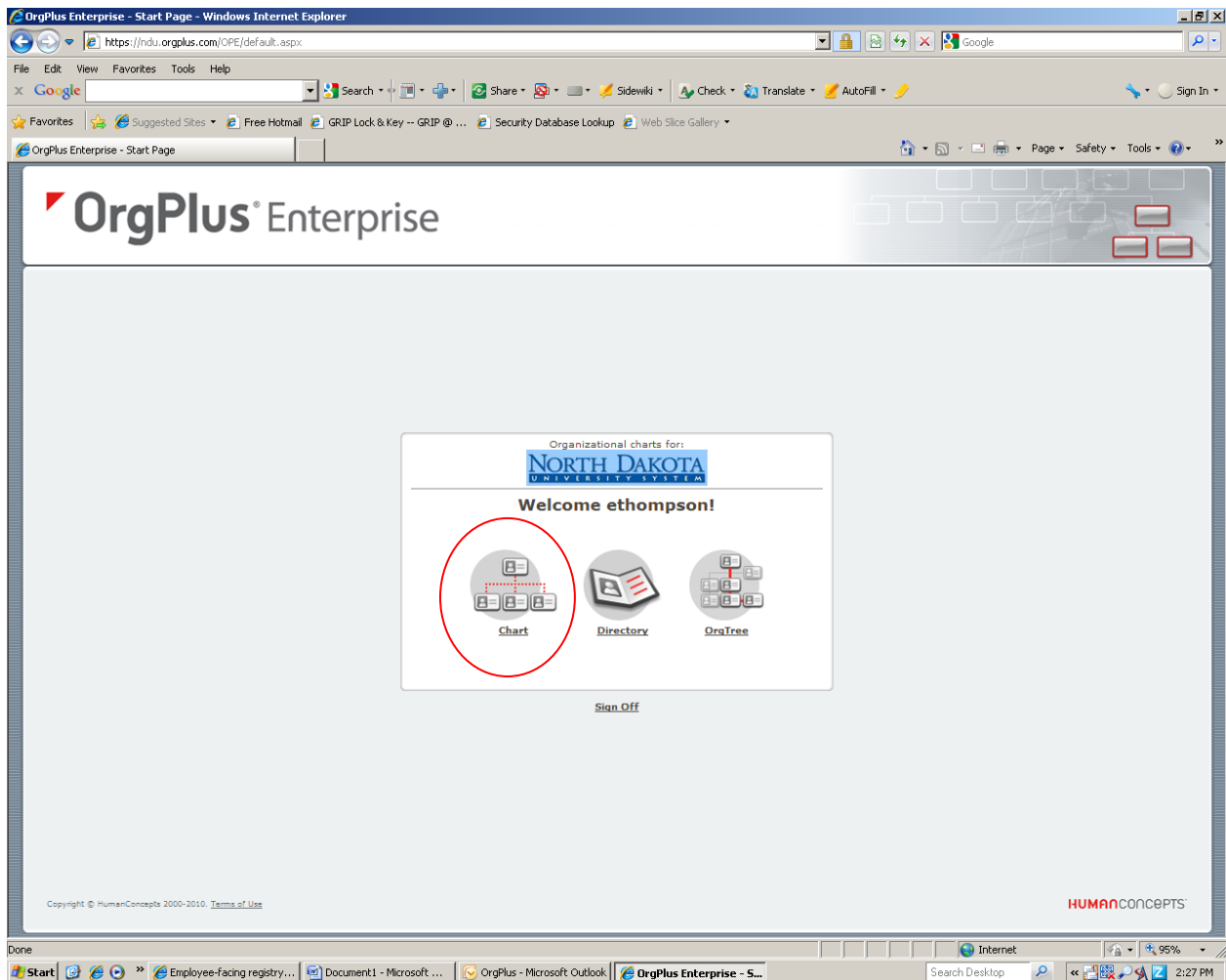


Click on the HE OrgPlus Login menu option to log into OrgPlus.





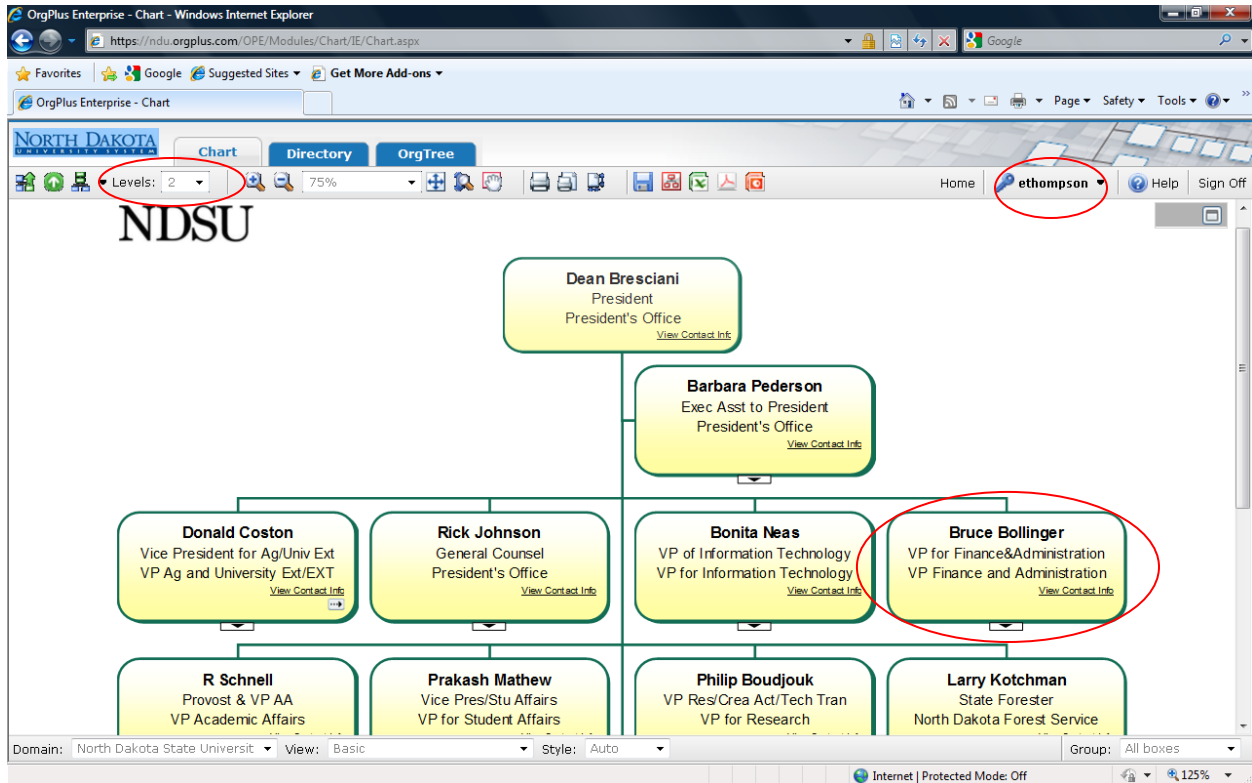
The first time that you log into HE OrgPlus it will prompt you to change your password, after changing your password, you will see the screen below:



Org Plus Enterprise allows for department org chart viewing for division, department or area, depending on your access.

Click on the Chart icon.

To change your password at any time in the future, you will click on your name in the upper right corner it will drop down the Change Password option.



It will bring up the Organization Chart for your Department and two levels above the Supervisor of your Department.

If you want to see the contact information of anyone on the Organizational Chart move your mouse over the hyperlink and it will display that information. See below:

The screenshot shows a web browser displaying an organizational chart for NDSU. The chart is titled "NDSU" and shows a hierarchy of roles. The top level is Dean Bresciani, President. Below him is Barbara Pederson, Exec Asst to President. The chart then branches into four main areas: Donald Coston (Vice President for Ag/Univ Ext), Rick Johnson (General Counsel), Bonita Neas (VP of Information Technology), and Bruce Bollinger (VP for Finance & Administration). Each of these areas has a subordinate role listed below it. A tooltip is visible over the "View Contact Info" link for Dean Bresciani, displaying the following information:

<b>Campus Address:</b>	Old Main 102
<b>Campus Phone:</b>	701/231-7211
<b>Campus Email:</b>	<a href="mailto:Dean.Bresciani@ndsu.edu">Dean.Bresciani@ndsu.edu</a>

The browser interface includes the address bar, navigation buttons, and a status bar at the bottom showing "Internet | Protected Mode: Off" and "125%" zoom level.

You can export the Org Chart to Excel, PDF format, or PowerPoint by clicking on the corresponding button:

The screenshot shows the 'OrgPlus Enterprise - Chart' application running in a Windows Internet Explorer browser. The browser's address bar displays the URL: <https://ndu.orgplus.com/OPE/Modules/Chart/IE/Chart.aspx?h=dc03520cde53497daea3840f268a63e88c=907b27a86cca456599ec741608eeb21>. The browser's toolbar includes a 'Send to Excel' button, which is circled in red. The application interface features a navigation bar with 'Chart', 'Directory', and 'OrgTree' tabs. The main content area displays the NDSU logo and an organizational chart. The chart is structured as follows:

- Bruce Bollinger** (VP for Finance&Administration, VP Finance and Administration) is the root of the chart.
- Gina Haugen** (Assistant to Vice Pres, VP Finance and Administration) reports to Bruce Bollinger.
- Under Gina Haugen, there are four roles:
  - Timothy Flakoll** (Dir of Oper - NDSU So Campus, VP Finance and Administration)
  - Michael Ellingson** (Facilities Mgmt Director, Facilities Management)
  - Gary Wawers** (Controller, Accounting)
  - Karla Mongeon-Stewart** (Dir, Chg Mgmt & Proc Improve, VP Finance and Administration)
- Under Timothy Flakoll, there are two roles:
  - Timothy Flakoll** (Non-employee, IIT-College)
  - Cynthia Rott** (Budget Director, Budget Office)
- Under Gary Wawers, there are two roles:
  - Mari Krag** (Director, Student Loan Collection Center)
  - Vacant** (Assoc VP, Finance & Admin, Human Resources/Payroll)

The browser's status bar at the bottom shows 'Domain: North Dakota State Universit', 'View: Basic', 'Style: Auto', 'Group: All boxes', and 'Done'. The browser's security status is 'Internet | Protected Mode: Off' and the zoom level is '125%'.

You can expand /collapse your view by clicking on the Expand/Collapse button:

The screenshot shows a web browser window displaying the OrgPlus Enterprise interface. The page title is "NDSU". The organizational chart is structured as follows:

- Dean Bresciani** (President, President's Office) is at the top.
- Bruce Bollinger** (VP for Finance & Administration) reports to Dean Bresciani.
- Gina Haugen** (Assistant to Vice Pres, VP Finance and Administration) reports to Bruce Bollinger.
- Reporting to Gina Haugen are four positions:
  - Timothy Flakoll** (Dir of Oper - NDSU So Campus, VP Finance and Administration)
  - Michael Ellingson** (Facilities Mgmt Director, Facilities Management)
  - Gary Wawers** (Controller, Accounting)
  - Karla Mongeon-Stewart** (Dir. Chg Mgmt & Proc Improvement, VP Finance and Administration)
- Reporting to these four positions are four more positions:
  - Timothy Flakoll** (Non-employee, Budget Director, Tri-College) reports to Timothy Flakoll (top).
  - Cynthia Rott** (Budget Director, Budget Office) reports to Michael Ellingson.
  - Mari Krag** (Director, Student Loan Collection Center) reports to Gary Wawers.
  - Vacant** (Assoc VP, Finance & Admin, Human Resources/Payroll) reports to Karla Mongeon-Stewart.

The "Expand/Collapse" button is located in the top right corner of the chart area, circled in red. The interface also includes a navigation bar with "Chart", "Directory", and "OrgTree" tabs, and a status bar at the bottom showing "Domain: North Dakota State Universit", "View: Basic", "Style: Auto", and "Group: All boxes".

When you expand it gives you that employees' information.

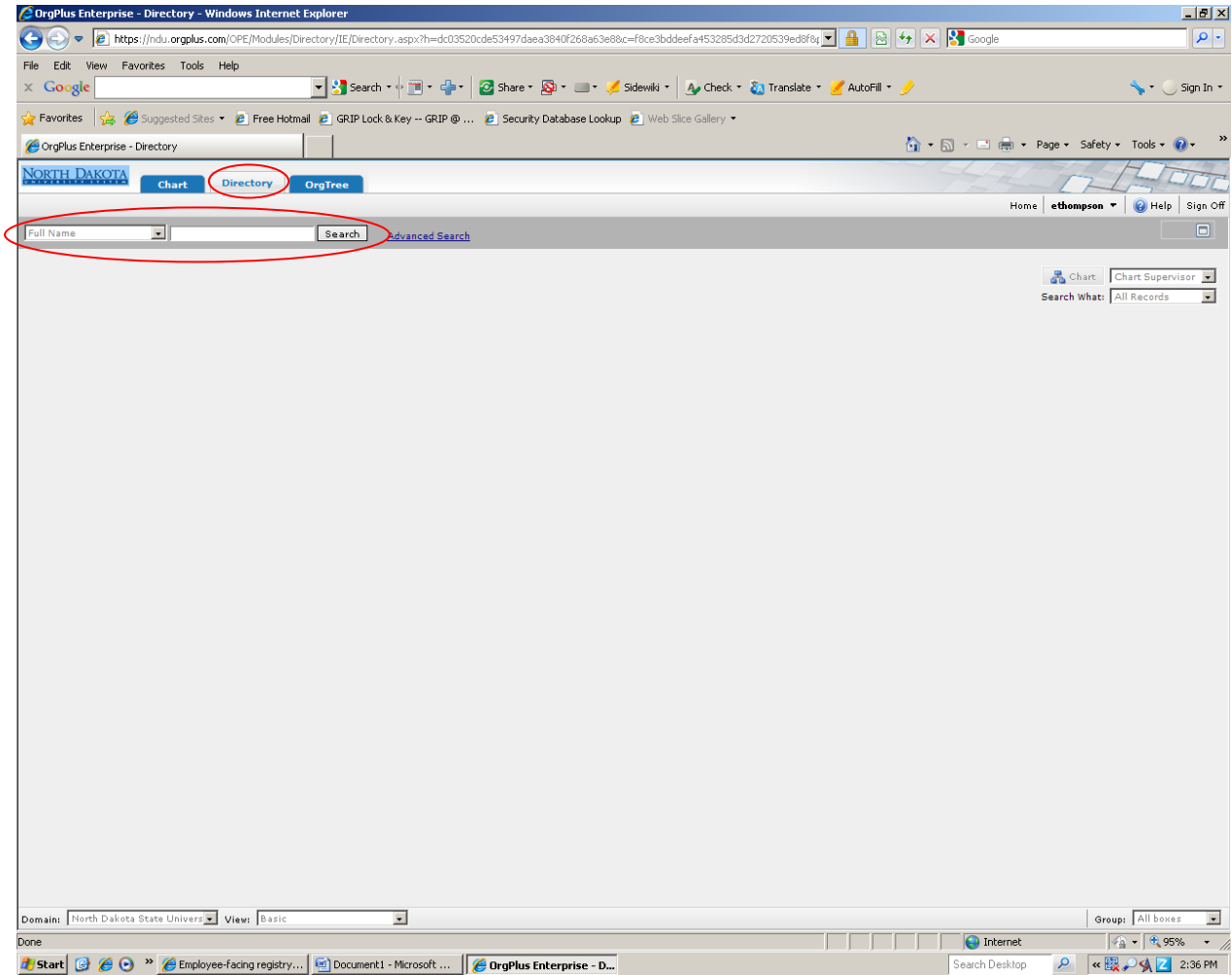
The screenshot displays the OrgPlus Enterprise web interface. The main content area shows an organizational chart for NDSU. At the top is Dean Bresciani, President. Reporting to him is Bruce Bollinger, VP for Finance & Administration. Under Bruce Bollinger is Gina Haugen, Assistant to Vice Pres. Reporting to Gina Haugen are four positions: Timothy Flakoll (Dir of Oper - NDSU So Campus), Michael Ellingson (Facilities Mgmt Director), Gary Wawers (Controller), and Karla Mongeon-Stewart (Dir. Chg Mgmt & Proc Improveme). Under Timothy Flakoll is another Timothy Flakoll (Non-employee). Under Michael Ellingson is Cynthia Rott (Budget Director). Under Gary Wawers is Mari Krag (Director). Under Karla Mongeon-Stewart is a Vacant position (Assoc VP, Finance & Admin).

On the right side, a detailed profile for Bruce Bollinger is shown. The profile includes the following information:

- Department Name:** VP Finance and Administration
- Supervisor:** Dean Bresciani
- Office Location:** Old Main
- Campus Address:** Old Main 11E
- Campus City/St/Zip:** ,
- Campus Email:** [Bruce.Bollinger@ndsu.edu](mailto:Bruce.Bollinger@ndsu.edu)
- Campus Phone:** 701/231-8412
- Business Phone:**
- Work Cell:**
- Fax:**

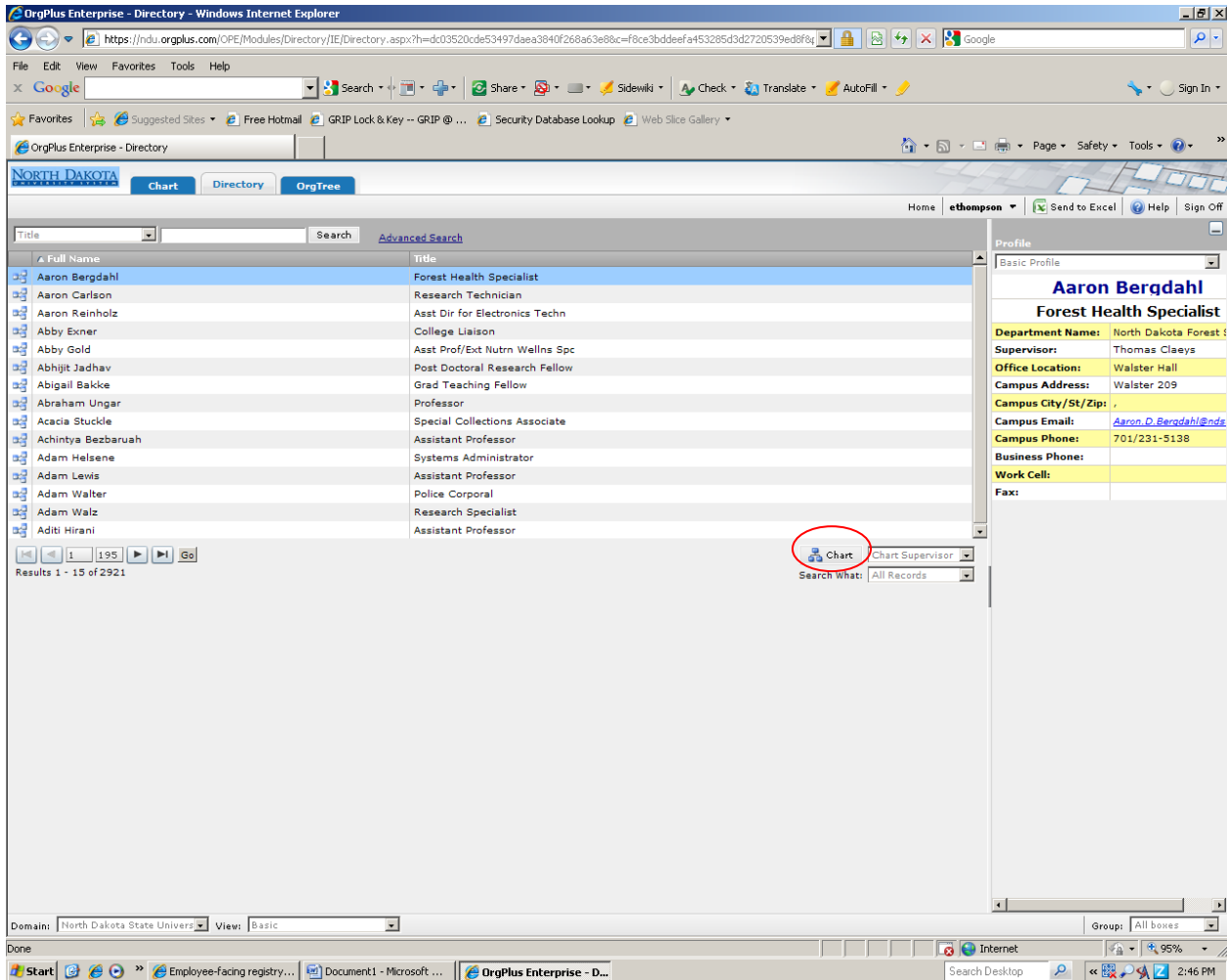
The interface also shows navigation tabs for 'Chart', 'Directory', and 'OrgTree', and a user profile for 'ethompson'.

The directory view allows for searching for a particular employee or a particular job title.



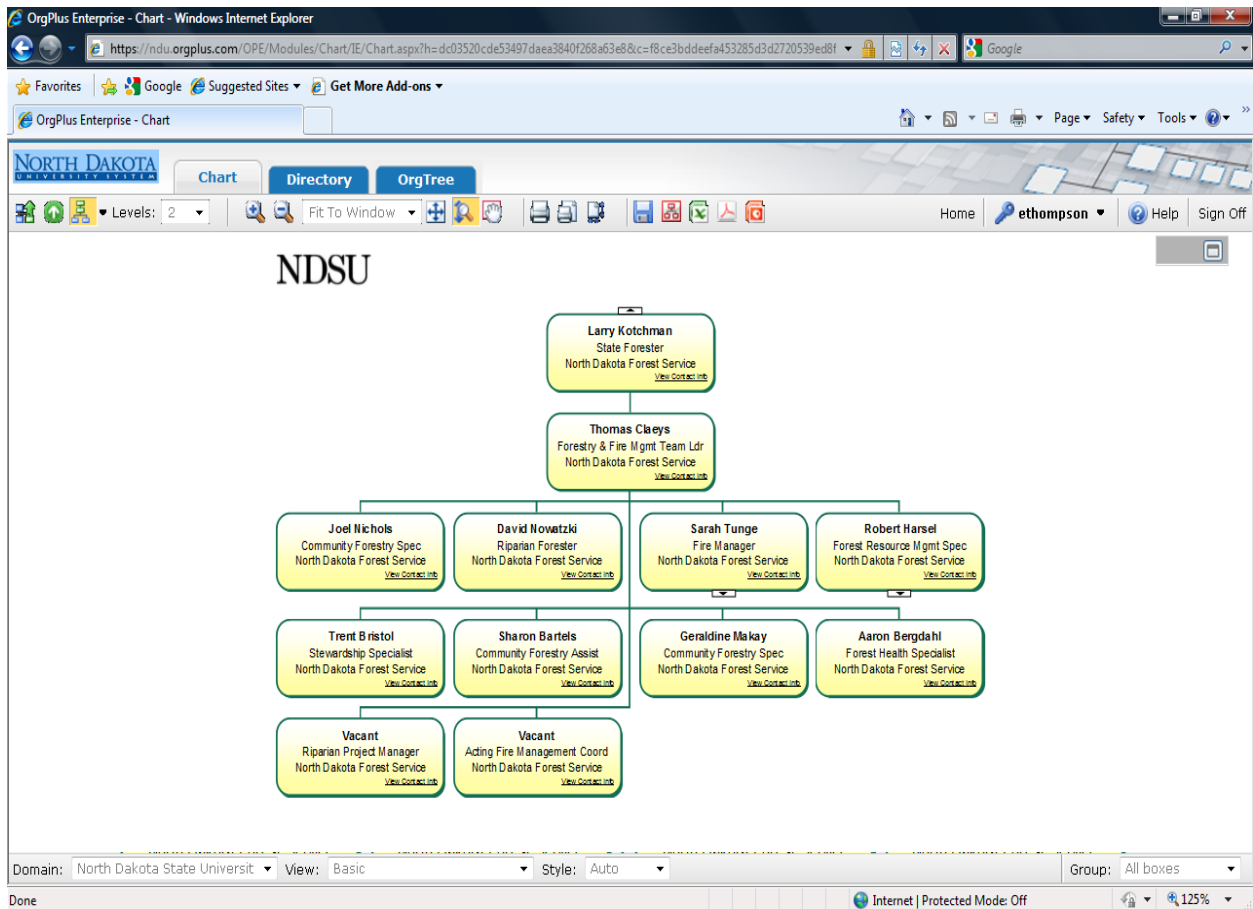


It can give a detailed or overview of the employee information. If you leave the conditions blank, it will bring up everyone in alphabetical order.

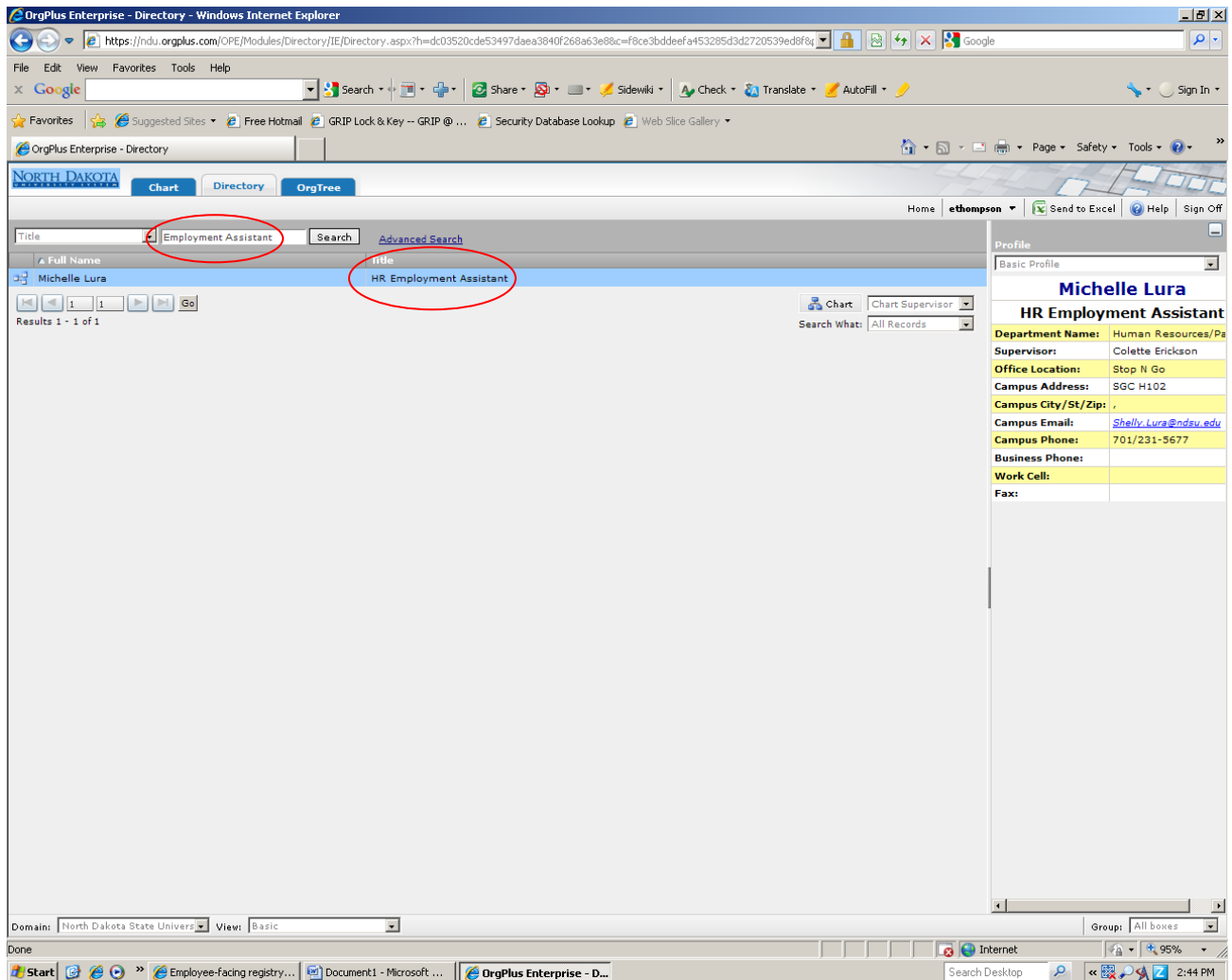


Select the employee you want and then click on the chart button to go back to the chart view.

It moves you back into the chart view, see below:



You can perform a basic search by clicking on the basic button and typing in the criteria. For example, below I have typed in the title "Employment Assistant", which brought up any positions that had Employment Assistant in the title.



On this screen I performed an advanced search and typed in the title starts with HR for the criteria, you need to click on the Add button and then the Search button and it will then perform the search.

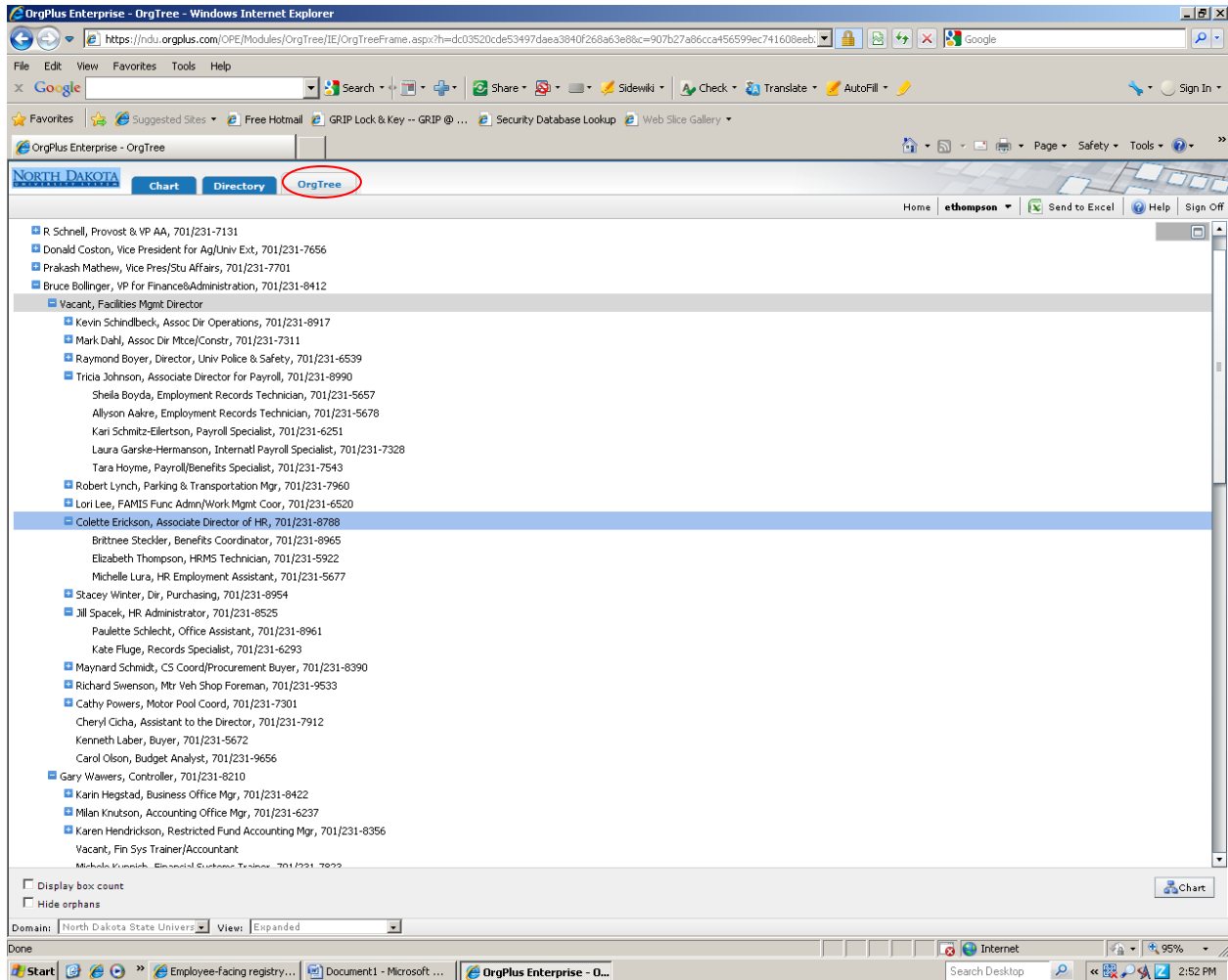
The screenshot shows the OrgPlus Enterprise Directory search interface. The search criteria are set to 'Starts with' and 'HR'. The search results show the following table:

Full Name	Title
Elizabeth Thompson	HRMS Technician
Jill Spacek	HR Administrator
Michelle Lura	HR Employment Assistant
Vacant	HR Clerk

The profile sidebar for Elizabeth Thompson is visible on the right, showing the following information:

- Department Name: Human Resources/Pa
- Supervisor: Colette Erickson
- Office Location: Stop N Go
- Campus Address: SGC H102
- Campus City/St/Zip: .
- Campus Email: Elizabeth.Thompson.1@
- Campus Phone: 701/231-5922
- Business Phone:
- Work Cell:
- Fax:

When you click on the OrgTree View it will display the same information in a tree with branches to expand.



**NDSU**

**Colette Erickson**  
Associate Director of HR  
1105  
00019230  
Human Resources/Payroll  
Salary  
Headcount: 3

**Michelle Lura**  
HR Employment Assistant  
4110  
00023966  
Human Resources/Payroll  
Salary

**Elizabeth Thompson**  
HRMS Technician  
4205  
00021481  
Human Resources/Payroll  
Salary

**Brittnee Steckler**  
Benefits Coordinator  
3110  
00020951  
Human Resources/Payroll  
Salary

Domain: North Dakota State Univers | View: Expanded | Style: Auto | Group: All boxes

Done

Start | Employee-facing registry... | Org Chart Section of Trai... | OrgPlus Enterprise - C... | Search Desktop | 95% | 2:53 PM

This is the expanded view that includes position number, job code, department name, and salary.